CASE STUDY #10: What Experience Do You and Your Team Members Provide?

PRACTICE PROFILE

- A two-doctor pediatric dental practice. New owner doctor was previously the associate dentist. She acquired an existing seven-year-old practice. The previous owner remained on as a part-time associate doctor less than 12 hours/week
- Two locations
- Owner doctor works four patient days per week and four to five in-office IV sedation days per year. Associate doctor works two to three half patient days per week and one in-office IV sedation day per month
- Six chairs: two restorative, four recare
- Team: two doctors (one owner doctor and one associate doctor), zero hygienists, six assistants, two front office
- Seventy percent of patients have PPO Insurances and 10 percent Medicaid
- Average monthly production as of 2017: $118,631 combined for both offices
- Average monthly collections as of 2017: $103,595 combined for both offices
- Collection ratio as of 2017: 87 percent
- Average monthly new patients: 67 new patients combined for both offices

DOCTOR CONCERNS

- Inexperienced at holding team members accountable
- Difficulty in managing the team, the practice’s growth and still do the dentistry
- Practice has plateaued
- Scheduling template needed in the dental practice management software

DOCTOR GOALS

- Create an efficient schedule
- Increase productivity for the doctor(s) and team
- Increase collections
- Create standard operating procedures for the front office team to maximize efficiency
- Work on team communication
- Focus on customer service and patient experience
- Market satellite practice for growth
- Add another associate in one year
- Understand how to market properly

FINDINGS

Leadership

- Doctor had natural leadership skills that required fine-tuning.
- There was no true practice coordinator, resulting in no accountability from the team.
- Front office leader struggled with holding front office team accountable, causing lack of communication and consistency.
- Job descriptions unclear about expectations
- Did not share practice production or collection goals with the team
- Team did not have consistent scheduled monthly meetings
- Goals and vision for the practice were not clearly conveyed to the team, causing unclear expectations

Team Dynamics

- Low team morale because there was no true team leader to implement and follow through with strong systems and team building activities
- Lack of teamwork and unity due to the team being unaware of a common goal to work towards
- Lack of follow through due to unclear expectations

Facility/Presentation

- One office was in a brand new space/location. The other office was a satellite office
- Open windows and beautiful parent & kid-friendly décor
- Very clean and organized
- Nice reception area for parents and play area for kids

Front Desk Efficiency

- Separate Check-in and Check-out areas
- Inefficient insurance verification system
- Insurance coverage tables not updated resulting in incorrect treatment plans
- Poor efficiency due to lack of standard operating procedures manual.
- Needed proper verbiage for cancellations, no shows or last-minute changes in the schedule
No use of route slips/daily huddle sheets
Appointment policy documents outdated and missing important information
Ineffective communication among team members regarding patient and appointment notes
Statements not being sent consistently
Collections process nonexistent

Scheduling/Production

Unproductive Morning Meetings due to a lack of someone to lead these meetings
Block Scheduling Template needed for efficient scheduling
New patient appointments not scheduled correctly and often ran behind, causing new patients to wait
Unscheduled treatment not followed up on
Inefficient recare system

Marketing

New logo created and website updated
No Marketing team established so owner doctor was doing most of the marketing
Community involvement and some school presentations
Social media not being posted to regularly
Effective website and good search engine optimization
Not consistent with tracking new patients and referral sources

Leadership Recommendations

Doctor shared his vision for the practice with the team to create unified goals to work towards
Created new practice and team mission statements. Posted them in the office where they could be seen
Identified Clinical Coordinator and Front Office Leader- doctor spent time having leadership meetings and developing them
Morning Huddles, monthly Team and Quarterly Department meetings happening consistently
Practice Vital Signs and goals monitored to ensure that implemented systems are working

Set individual performance goals for the year during scheduled performance reviews

Team Dynamics Recommendations

To increase team morale, team members and doctors express appreciation for each other daily
Schedule quarterly “Team Building/Bonding” events
Update job descriptions and review them periodically for updates
Team members held accountable to accomplish their expectations

Front Desk Recommendations

Everyone taught proper verbal skills and techniques for converting shoppers
Create Standard Operating Procedures Manual for the front office team to reference. Use this manual as a guide for training all new team members
Properly trained to:
- Maintain healthy accounts receivable
- Verify and update insurance
- Use Dentrix software optimally
- Schedule appointments according to customized templates related to practice goals
- Trained on best verbiage to keep schedule filled during school hours how to minimize last minute cancellations and no-shows

Scheduling/Production Recommendations

By placing patients in the proper block on the schedule, the experience gets up-leveled for the patient/parent and those scheduled around them
A block scheduling template created to meet producer goals will contribute to a smooth flow and decrease running late with appointments
Make sure specific front office personnel are held accountable for keeping the recare and restorative schedules full
Full treatment to be entered consistently and correctly by clinical team members prior to walking patient to check-out
Schedule uninterrupted time for specific team members to work the past due recare and unfinished treatment plan reports

Marketing Recommendations

Theme days should be done once to four times monthly and posted to social media
Create a plan to post consistently to social media
Authentic videos, Boomerang videos and photos and videos using Snapchat get more responses and engagement than just pictures
Many parents like posting about their children’s experiences. Always have a signed consent form and only use their first name in the posts. Encourage parents to tag your social media pages
Patients love to be celebrated. Create multiple opportunities to celebrate your patients during their visit, such as a Smiles Club, birthday prizes or a fun photo booth
Create a full team birthday video email to be sent through your Patient Communication Software to patients
Compliments from parents are perfect opportunities to inform them that we are always accepting new patients
Team should understand that they are all part of the Marketing team
Track new patient referral sources and send hand-written thank you notes
Increase efforts to connect with referring and non-referring local healthcare providers to increase referrals and word of mouth

POST COACHING RESULTS

Business Analysis Report & Recommendations report created and followed
Two Front Office Leaders needed to assist in the growth of each practice
Hiring a full-time associate to have three doctors between the two offices
New leaders and doctor began holding team members accountable in a respectful and timely manner
Team united and worked together toward a common goal
• Substantial decrease in no-shows and cancellations
• Noticeable increase in production and collections due to new systems and increased understanding of software utilization
• Reviewing practice goal numbers and team became motivated seeing they could hit and surpass their goals
• Production increased 10 percent by an additional $12,000/month to $130,562/month by 2018
• Collections increased 18 percent by an additional $19,000/month to $122,685/month by 2018
• Collection ratio increased by six percent to 93 percent as of 2018
• New patients increased 34 percent from 67/month to a total of 90 new patients per month

“If you build a great experience, customers tell each other about that. Word of mouth is very powerful.”

Jeff Bezos, founder of Amazon

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